

# **Montana Department of Public Health and Human Services**



## **Self-Directed Personal Assistance Services**



### **A Consumers' Guide to the Self-Directed Personal Assistance Program**

Senior and Long Term Care Division  
September 2007



## How Can This Booklet Help Me?

This booklet is for people who are receiving personal assistance services in their home or would like to begin receiving services. This booklet will provide you with the resources needed to manage your care under the Self-Directed Personal Assistance Program.

While there are many places to turn for assistance, there is no real "consumer-buying guide" for this type of care. We have put together this booklet to provide you with basic tips designed to walk you through the many aspects of the Self-Directed Personal Assistance Program.



## Table of Contents

What Exactly is the Self-Directed Personal Assistance Program?	4
Who Are Personal Assistants?	4
What Do Personal Assistants Do?	4
Who Do Personal Assistants Work For?	4
Who is Eligible for the Self-Directed Personal Assistance Program?	5
How Do I Get Services and Who Decides What Services I Will Receive?	6
What Am I Responsible For?	7
What Will the Provider Agency I Choose be Responsible for?	8
Can My Family Help Me and Get Paid For It?	9
How Old Do I Have To Be To Receive Personal Assistance Services?	9
When Should I Contact My Provider Agency?	10
What are Health Maintenance Activities?	10

## Table of Contents, continued

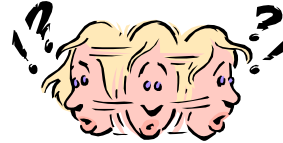
What Services Can I Receive?	11
What Services Can't I Receive?	12
Looking for Help	13
Defining the Job	14
Screening	15
Interviewing	16
Now That I've Found that Right Person, What Do I Do?	17
Now You Can Offer the Job!	18
Keeping Your Personal Assistant	19
What Do I Do if I have a Complaint?	20
Requesting a Fair Hearing	21
Need More Information?	22



## ► Self-Directed 101

### What exactly is the Self-Directed Personal Assistance Program?

The Self-Directed Personal Assistance Program is designed for individuals who wish to assume the responsibility and flexibility of managing their care. This includes managing a personal assistant's work schedule, length of employment, and training.



A provider agency provides oversight of your self-directed personal assistance services. A provider agency is an organization that enrolls with the Department of Public Health and Human Services to oversee personal assistance services. You can choose which agency you use.

### Who are Personal Assistants?

Personal Assistants are people who are dedicated to helping you stay in your home. Personal assistants vary in age and can be a man or a woman.

### What do Personal Assistants do?

Personal Assistants help you with your activities of daily living. Activities of daily living include bathing, dressing, grooming, toileting, transferring, positioning, mobility, meal preparation, eating, exercise, and medication assistance. You will train your personal assistant regarding your specific needs.

### Who do Personal Assistants work for?

A Personal Assistant is an employee of the provider agency you choose and the assistant must meet the provider's hiring conditions. However, you manage the assistant's work schedule, environment, length of employment, and training.



## Who is eligible for the Self-Directed Personal Assistance Program?

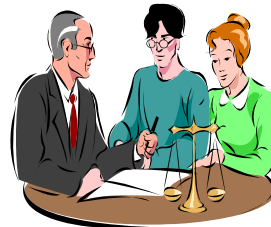
In order to participate in the Self-Directed Program you must:

1. Be eligible for Full Medicaid;
2. Have a medical condition that requires you to need in-home assistance;
3. Be able to make choices about your activities of daily living and understand the impact of these choices;
4. Be able to assume responsibility for the choices you make; and
5. Be capable of managing all tasks related to your care.

Under certain circumstances, a Personal Representative may assume these responsibilities on your behalf. A Personal Representative is someone who represents your interests and is not a paid caregiver.

A Personal Representative must:

- Be an individual who understands your care needs;
- Be capable of directing your care;
- Have a personal relationship with you;
- Be immediately available to provide or obtain back up services in the case of an emergency or when a personal assistant does not show up; and
- Assume all medical and related liability associated with directing your care.



You can ask your provider agency or your local Regional Program Officer any questions you have about being eligible for the Self-Directed Program. A list of Program Officers is on page 23.



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### How do I get services and who decides what services I will receive?

You can call a local personal assistance agency yourself or have your personal representative do this on your behalf. You can also call Mountain Pacific Quality Health. Mountain Pacific Quality Health is an organization that contracts with the State of Montana to perform authorization functions of the Personal Assistance Services Program.



The type of care authorized is dependent upon your needs, living situation, and approval of your health care professional. A health care professional can be a certified physician assistant, nurse practitioner, registered nurse, occupational therapist, or a medical social worker who is working as part of a case management team.

After a call is made, a referral is sent on to a nurse at Mountain Pacific Quality Health. A nurse will contact you within 10 working days and visit you at your home within 30 working days of receiving the referral.

During the visit, the nurse will do the following:

- Find out what you need help with;
- Determine if you are capable of directing your own care;
- Explain the process; and
- Give you materials explaining the program and a list of providers in your area.

You can call Mountain Pacific Quality Health at any time with a referral. They can be reached at 1-800-497-8232.





## What am I responsible for?

There are a number of things you are responsible for before you can begin directing your care.

- You must obtain approval from your health care professional to participate in the program.
- You must be able to make your own decisions and choices or have someone you trust make decisions and choices for you.
- If you have someone you trust to make decisions for you, you must let your provider agency know who this person is and how to contact them.
- You must have an emergency back up plan in place in case your personal assistant doesn't show up.
- You must participate in a review twice a year with your provider agency. This ensures that everything is going well and that you are getting the care you need to stay in your home.
- You must review and approve your personal assistants' time sheets. Time sheets are a legal document and must show the tasks that you are directing in your home. Putting the wrong information on your personal assistants' timesheet is illegal and constitutes fraud.
- You must participate in a yearly review with Mountain Pacific Quality Health. They will review your care needs to make sure you are getting the services you need.



Under the Self-Directed Personal Assistance Program, you assume all medical and related liability regarding your care. If you have a Personal Representative, they assume this liability for you.



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### What will the provider agency I choose be responsible for?

Before you begin self-directed services in your home, your provider agency must do the following things:

1. Give you information regarding policies and program philosophy;
2. Tell you what they are responsible for and what you can do if you have a complaint about your care;
3. Make sure that you understand what services you're authorized for and that you are using your services correctly;
4. Make sure that your service plan is signed by a health care professional; and
5. Review your plans for emergency back-up, personal assistant recruitment and training.



The provider agency will become the employer of record and will review all timesheets that are approved by you.

A representative from your provider agency will visit you at your home at least two times per year to monitor and review your care needs.



## Can my family help me and get paid for it?

Immediate family members **cannot** be paid by Medicaid to provide personal assistance to you.

Immediate family includes the following:

- Husband or wife;
- Natural parent of a minor child (less than 18 years old);
- Adoptive parent of a minor child;
- Step-parent of a minor child;
- Foster parent of a minor child; and
- Legal guardian.

Other family members may be eligible for payment if they are hired by an enrolled Medicaid provider (a private agency that has an agreement with the Montana Medicaid program to provide personal assistants).

Provider agencies do not have to hire your relatives and all personal assistants must meet the provider's hiring conditions. If a provider agency does hire your family member, they must also meet the provider's hiring conditions.

## How old do I have to be to receive Personal Assistance Services?

You may receive personal assistance services regardless of your age. However, if you are under the age of 18, you will receive services based on medical need, age appropriateness, and family support. You must also have a personal representative helping you manage your care.



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### When should I contact my Provider Agency?

Once you are enrolled in the Self-Directed Personal Assistance Program, there are specific times when you should contact your provider agency. These include:

- If your needs change and you need more or less assistance;
- If you are being harmed, abused, or neglected;
- When you are hospitalized or go into a nursing home; and
- When you need to hire or fire a personal assistant.

Calling in concerns to your provider agency protects you and allows your agency to better manage your services. In turn, if the assistant has difficulty in providing services to you, they may also notify the provider agency.

### What are Health Maintenance Activities?

Health maintenance activities are skilled nursing tasks that can be done by your personal assistant if your health care professional agrees.

Health maintenance activities that you may direct include:

- Administering medications.
- Urinary systems management.
- Wound care.
- Bowel Care.

You can choose to direct all or some of these activities.



## What Services can I receive?

Make sure you understand and can clearly communicate what services you need help with. The potential services which Medicaid will pay for are listed below:

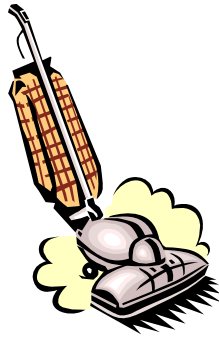
Service	Examples	Restrictions
<b>Activities of Daily Living</b>	<ul style="list-style-type: none"> <li>• Bathing</li> <li>• Dressing</li> <li>• Grooming</li> <li>• Toileting</li> <li>• Transferring</li> <li>• Positioning</li> <li>• Meal preparation</li> <li>• Eating (including tube feeding)</li> <li>• Exercise</li> <li>• Medication assist</li> </ul>	These services may only be provided to the person receiving personal assistance services.
<b>Housekeeping Tasks (to ensure a safe environment)</b>	<ul style="list-style-type: none"> <li>• Changing bed sheets</li> <li>• Light housekeeping</li> <li>• Cleaning medical equipment</li> <li>• Laundry</li> <li>• Washing dishes</li> </ul>	<ul style="list-style-type: none"> <li>• When you live with your family, the family must do most household tasks.</li> <li>• Household tasks may only be provided if the person has one of the activities of daily living needs outlined above.</li> <li>• This does not include household tasks for the entire family.</li> </ul>
<b>Escort to medical appointments</b>	Going with and assisting a person to medical appointments paid for by Medicaid .	Escort is only approved when you need hands on assistance to or at a medical appointment and when a family member or significant other is unavailable to transport.

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### What Services can't I receive?

The list below shows some of the household duties that your personal assistant is *not* allowed to do:

- Cleaning floor and furniture in areas that you do not use. For example, cleaning the entire living room if you use only your bedroom.
- Doing laundry or bedding that you do not use. For example, doing the laundry for the entire family.
- Shopping for groceries or household items that you do not need for health or nutrition.
- Supervision, babysitting, or friendly visiting.
- Taking care of your pets-unless the pet is also a service animal trained to help you stay in your home.
- Taking care of your lawn, window washing, and cutting wood.
- This program is not a housekeeping program.



## Looking for Help

Now you are ready to find the right person to help you in your home. Getting the word out in many ways can assist you in finding that right person.

Here are some options:

- Word of Mouth - recommendations from a trusted friend or relative.
- Job Centers at Colleges and Universities.
- Churches.
- Senior Centers.
- Newspaper Advertising.
- Community Centers.



Any time an ad is taken out or a flyer is made, consider these tips first:

- Make your job sound appealing.
- Consider an answering service/ PO Box.
- Do NOT list your address.
- Do NOT list your full name.
- Be clear on when to call.
- Get advice from the newspaper staff. They may have additional tips.



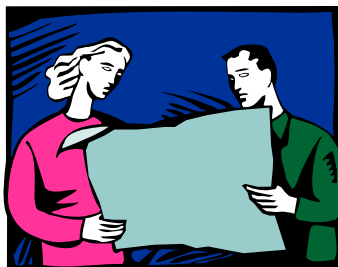
## ▶ Self-Directed 101

### Defining the Job

When defining the job, think about what you want your personal assistant to do. Make sure you include at least the following:

- A detailed list of duties to be carried out.
- Statement of wages and benefits.
- Hourly wage, mileage reimbursement, and meals.
- Paid time off, if any.
- Whether the caregiver can bring children to your home.
- Hours of work and schedule.
- Unacceptable behaviors - with the consequences.
  - ⇒ Smoking, abusive language, etc.
  - ⇒ Abuse, exploitation, harm
- How to fire the person if things don't work out.

Defining the job before looking for help will help you in your selection process. You will also be prepared to hire that "right" person when you find them.





## Screening

Screening means identifying good prospects while eliminating the rest. When a person calls you in response to your ad:

- Ask open ended questions like "Tell me about yourself."
- Explain your needs.
- Clarify job duties, pay, and time off.
- Tell them what you expect them to be doing.
- Ask some basic questions to eliminate unqualified candidates. Consider these questions:
  - ⇒ Do you have experience as a caregiver?
  - ⇒ Do you have a driver's license?
  - ⇒ Are you currently working?
  - ⇒ Why are you attracted to this job?



The goal is to screen out inappropriate respondents on the phone. Don't make an interview appointment on your first call. Instead, call them back as early as the next day to set up a date. This gives the applicant a chance to digest what was discussed while giving you the opportunity to eliminate spontaneous callers.

*Asking some basic questions over the telephone provides you with a first impression of the applicant.*



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### Interviewing

Now that you've chosen the applicants you would like to interview, the next step is to set up a time to meet with them. Sometimes it is helpful to bring another person along for the interview to observe and provide a second opinion.

1. Bring notepaper and additional questions for the interview.
2. Go over the job duties with the person. Be specific about what the person will be doing and what you expect.
3. Ask other questions. Keep focused and have the person do most of the talking. Take notes to help you remember answers.



For additional questions, consider these:

- Why are you looking for work?
  - How do you feel about caring for another person?
  - Do you have experience cooking for others?
  - What time commitments are you willing to make to stay on the job?
  - Is there anything in the job description that concerns you?
  - Do you have transportation?
  - Can you safely lift or transfer an individual?
  - What kind of training have you had to meet the needs of this job?
4. After each interview is completed:
    - Review and finalize notes.



## Now that I've found that right person, what do I do?

Once you've found the person you want to be your personal assistant, let your provider agency know who you've chosen.

Your provider agency will then be responsible for the following activities relating to your care:

1. Documenting and verifying your Medicaid eligibility on a monthly basis;
2. Assisting with required paperwork; and
3. Providing payroll functions for your personal assistant.  
This will include reviewing all timesheets submitted by you and issuing your personal assistant's paycheck.



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### Now You Can Offer the Job!

When you have chosen that right person to fill the job:

- Let the person know as soon as you decide.
- Set up a time to meet with them in your home.
- Review the work contract in detail.
- Determine a schedule that will work for both you and your personal assistant.
- Go over the job duties in detail.
- Let your personal assistant know what you need help with and how you would like it done.
- Go over the layout of your home. Make sure the personal assistant knows where important things are.
- Discuss your rules and expectations. Be specific.
- Don't rush training. This is critical to ensuring success with you and your personal assistant.

Under the Self-Directed Personal Assistance Program you are responsible for providing on-the-job training for your personal assistant. Your provider agency will not train your personal assistant. In some cases, an experienced assistant may train a new assistant.



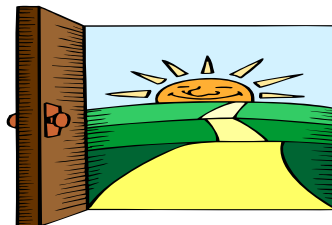
## Keeping Your Personal Assistant

Now that you have found that right person, wouldn't it be great to keep them?

All employees, regardless of their line of work, want to feel appreciated.

Consider the following:

- Offer a pleasant working environment that is enjoyable.
- Communication is the key to a good relationship.
- Be clear when giving directions. Make sure your assistant understands your needs completely.
- Understand your personal assistant's need for time off due to illness, injury, or a vacation.
- Discuss schedule changes in order to meet everyone's needs.
- Remember that your personal assistant can't read your mind.
- Treat your personal assistant as you would like to be treated.
- Say "Thank You" for a job well done.



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### What do I do if I have a complaint?

As a recipient of Medicaid, the Department of Public Health and Human Services does not exclude, deny benefits to, or otherwise discriminate against any person on the basis of race, color, national origin, age, sex, handicap, political beliefs, religion, or disability. This includes the admission to, participation in, or receipt of services or benefits for any of its programs, activities or employment, whether carried out by the department, through a contractor, or other entity.

In case you have questions or in the event that you wish to file a complaint alleging violations, please contact:

Client Discrimination  
Complaint Coordinator  
406-444-3136 or  
TDD: 800-253-4091



Or you may file a complaint with:

U.S. Department of Health and Human Services Office  
for Civil Rights  
Federal Office Building  
1961 Stout Street, Room 1426  
Denver, CO 80294-3528  
Phone Number: 303-844-2024



## Requesting a Fair Hearing

You may request a fair hearing with the Department of Public Health and Human Services under the following circumstances:

- Reduction in your service level, if you disagree.
- Denial of services, based on program eligibility criteria.

You must request a fair hearing in writing. Mail the request to:

Department of Public Health and Human Services  
Hearings Officer  
PO Box 202951  
Helena, Mt 59620-2951

A request for a fair hearing must be postmarked or delivered to the Department of Public Health and Human Services no later than 90 calendar days following the date of notice of determination.

Your provider agency or local Regional Program Officer can help you with any questions. A list of Regional Program Officers is on the next page.



## Self-Directed 101

### NEED MORE INFORMATION??

The following is a list of the Regional Program Officers (RPO) Offices in Montana. Please feel free to call the RPO office in your area.

RPO Office	Phone	Counties
Billings Office 2121 Rosebud Dr. Suite D Billings, MT 59102	Phone: 655-7644 Phone: 655-7635 FAX: 655-7646	Big Horn, Carbon, Golden Valley, Musselshell, Stillwater, Treasure, Wheatland, Yellowstone
Bozeman Office 220 W. Lamme, Suite 1E Martel Building Bozeman, MT 59715	Phone: 586-4089  FAX: 587-7863	Gallatin, Madison, Park, Sweetgrass
Butte Office 700 Casey Butte, MT 59701	Phone: 496-4989  FAX: 782-8728	Beaverhead, Deer Lodge, Granite, Silver Bow, Montana State Prison
Glendive Office 218 W. Bell, Suite 205 Glendive, MT 59330	Phone: 377-6252  FAX: 377-1240	Carter, Custer, Daniels, Dawson, Fallon, Garfield, McCone, Powder River, Prairie, Richland, Roosevelt, Rosebud, Sheridan, Valley, Wibaux
Great Falls Office 201 1st Street South Great Falls, MT 59405	Phone: 453-8902  Phone: 453-8975  FAX: 454-6082	Blaine, Cascade, Choteau, Fergus, Glacier, Hill, Judith Basin, Liberty, Petroleum, Phillips, Pondera, Teton, Toole
Helena Office 3075 N. Montana Avenue Helena, MT 59620	Phone: 444-1707 FAX: 444-9659	Broadwater, Jefferson, Lewis & Clark, Meagher, Powell, Montana State Hospital Long Term Care Unit
Kalispell Office 2282 Hwy 93 South Kalispell, MT 59903	Phone: 755-5420 FAX: 751-5944	Flathead, Lake, Lincoln
Missoula Office 2681 Palmer, Suite K Missoula, MT 59808	Phone: 329-1312 Phone: 329-1310 FAX: 329-1313	Mineral, Missoula, Ravalli, Sanders





*In closing.....*

Your home is where you are the most comfortable  
and where you can be your true self.

When prolonged illness or frailty occurs, it is  
possible to remain at home with quality in-home help.

The key is to:  
evaluate, organize and plan



## Montana Department of Public Health and Human Services

### *Acknowledgements*

The following resources were utilized to develop this guide:

Price, June; *Avoiding Attendants from Hell, A Practical Guide to Finding, Hiring, and Keeping Personal Care Attendants*, 1998.

*Hiring in Home Help*; Montana Department of Public Health and Human Services, 2002.

*Lets Learn Together*; Montana Department of Public Health and Human Services, 2002

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